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Submitted to the Program of Organizational Dynamics, College of Liberal and Professional Studies in the School of Arts and Sciences in Partial Fulfillment of the Requirements for the Degree of Master of Science in Organizational Dynamics at the University of Pennsylvania

Advisor: Charline S. Russo, EdD

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Bold Moves Of A Reluctant Mid-Life Career Change Heroine

Abstract

This Capstone is a reflective summary of my learnings gained during my journey in the Organizational Dynamics graduate program at the University of Pennsylvania (UPenn). Through a series of personal stories of growth and perspective, I share how I navigated a mid-life career change and used key learnings from these courses to reframe my thinking and arm me with new skills and knowledge to prepare me for a career change. The paper focuses on topics related to leading both organizational and personal change and outlines the real and perceived obstacles that mid-life career professionals encounter that prevent them from navigating change in their career journey. I hope the learnings presented in this paper can help support other mid-life professionals who want to advance their career goals, release assumptions, and break their immunity to change.

Keywords

mid-life career change, organizational change, personal change

Comments

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BOLD MOVES OF A RELUCTANT MID-LIFE

CAREER CHANGE HEROINE

by

Kimberly Miller Robbins

Submitted to the Program of Organizational Dynamics,
College of Liberal and Professional Studies
in the School of Arts and Sciences
in Partial Fulfillment of the Requirements for the Degree of
Master of Science in Organizational Dynamics at the
University of Pennsylvania

Philadelphia, Pennsylvania

2021

BOLD MOVES OF A RELUCTANT MID-LIFE

CAREER CHANGE HEROINE

Approved by:

Charline S. Russo, EdD, Capstone Advisor

Bruce Friedman, MSOD, CPA

ABSTRACT

This Capstone is a reflective summary of my learnings gained during my journey in the Organizational Dynamics graduate program at the University of Pennsylvania (UPenn). Through a series of personal stories of growth and perspective, I share how I navigated a mid-life career change and used key learnings from these courses to reframe my thinking and arm me with new skills and knowledge to prepare me for a career change. The paper focuses on topics related to leading both organizational and personal change and outlines the real and perceived obstacles that mid-life career professionals encounter that prevent them from navigating change in their career journey. I hope the learnings presented in this paper can help support other mid-life professionals who want to advance their career goals, release assumptions, and break their immunity to change.

ACKNOWLEDGMENTS

I'd like to thank a cast of supporters who got me to the finish line. Please call on me to return the favor of support and to discuss any bold moves.

There will always be room on my skateboard for Dr. Charline Russo. Thank you for your patience with me as I continued to keep changing—jobs, priorities, my focus. Despite my starts and stops, you lifted my spirits with inspiration and your genuine interest in my work and my story. You shared your expertise on topics and research to make my learning reflections more meaningful to myself and other.

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I share love and gratitude to Chris, that “Guy I Have Lived With for 20-Plus Years.” Perhaps the next time the conversation leads to the question, “What is it that you do?” you can read this Capstone! I know you may not always understand, but you always stand by me. Remember: Negative confirmation and unconditional positive regard are indeed different. Thank you for your unconditional positive regard, and I can confirm I have the same for you.

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books, waiting for a treat or a walk and barking out the window at anyone that passes by. You came into my life when this journey started. Thank you for your loyalty.

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Thank you, Rachel, for caring—always. Thank you for your interest in my work. Thank you for 40-plus years of friendship.

Thanks to the wise words of the late comedian Gilda Radner. The stars aligned for me one day when I found a famous quote from her buried in my desk. (I had saved it from a calendar gifted to me by Rachel.) This message was the first (and last) sign that I was looking for to get me going on my journey. Ironically, it was the quote that appeared on June 27—my birthday:

*Life is about not knowing, having to change, taking the moment and making the best of it, without knowing what's going to happen next.
Delicious Ambiguity.*

Thanks to my teenagers, Cameryn and Natalie, for their understanding of why I missed some things and dinner was sometimes haphazard. Just think of all the extra time I will have to spend with you now. (I can see the eyes rolling.)

Thanks to the big guy, Joelle “Trust the Process” Embiid. You are an authentic all-star who moves me with your tears, your goofiness, your vulnerability, and your commitment to get better. You influenced me to trust the process, and I may have mumbled that line to myself over these last few years.

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CHAPTER 1

INTRODUCTION

Introduction to a Reluctant Mid-Life Career Change Heroine

This Capstone topic formed from my own personal experience in committing to a career change decision at 45 years old. The feedback I received from my colleagues and friends after making that decision ignited my curiosity to understand what enables and prevents career professionals to act on career goals and interests during mid-life. Until my decision to act on my own career goal, I had been a survivor of 14 years of corporate reorganizations. For several years I had wanted to influence a change for my career instead of navigating the change around me. Yet, I was good at talking myself out of making a move and convincing myself that my current career situation served me well.

This Capstone provides the opportunity to share my story of uncovering hard truths about myself, addressing deep-rooted fears, learning how to graciously surrender, and finding joy in vulnerability. My story unfolded as a process—one that I didn't necessarily consider until I took the time to look up and look back while writing this Capstone. My experiences in classes exposed me to frameworks and tools but, more importantly, a new muscle I continue to develop—one that gives me stability to remain curious and strength to reframe a reality and balance my personal learnings and failures with less judgment.

Goals

Given the reaction I received upon my choice to make a change, I believe many mid-life career professionals stay in jobs or on a career path that no longer interests or

fulfills them. My assumption is mid-life career professionals tell themselves stories about pursuing a new career path or job change may be risky and that the proverbial grass may not be greener on the other side. The purpose of this Capstone is to create an awareness of what prevents mid-life career professionals from acting on career change goals at a time when people are working longer (Edleson, 2019). Learnings from this self-discovery are important to not only mid-life career professionals but also career counselors and coaches who are working with mid-life professionals in transition. In addition, I believe these insights can be useful to employers looking for ways to improve talent development in their organizations and coach mid-life career professionals.

Structure

This Capstone takes shape through stories of personal reflection and learning, combined with reviews of relevant literature and theories from thought leaders in the world of organizational change and human development. As I wrote this reflective Capstone, I met new friends on podcasts while I was on walks through my neighborhood during a global pandemic. These friends helped me understand how I ultimately did change; I reference them throughout my personal learning story. These trailblazers and courageous observers include Brené Brown, Susan David, and Sarah Lewis—to name a few of them.

I present information about the Immunity to Change™ diagnostic tool, stages of adult development, unconditional positive regard, and emotional agility. I also demonstrate how they can be used to diagnose and reflect on immunity to change. My personal stories of vulnerability bring these concepts to life with examples of my own use of the Immunity to Change™ diagnostic tool. I describe how I applied knowledge gained in classes to test my assumptions using liberating structures, appreciative inquiry, and

transition monitoring teams for leading organizational change. I also share details on how I ultimately made a “bold move” to leave my longtime employer. The journey continues with the realization that I can change again and a growing confidence to help others through change as an Immunity to Change™ map making coach. I close the paper with some personal reflections and suggestions you can apply to bold moves you may be considering.

I believe my reflective journey has the potential to shed light on real and perceived barriers to navigating career change goals during mid-life. I believe successful change can occur at any stage in life, and I believe it may start with challenging rock logic views and unloading assumptions many people have carried for far too long.

CHAPTER 2

MY RELATIONSHIP TO IMMUNITY TO CHANGE™

As a mid-life career professional who has spent many years of her career working to lead change, transform mindsets, and coach organizations to adopt new behaviors, I understand the irony in the fact that I struggled with making a change in my own career during my mid-40s. While I muddled through it and eventually (painstakingly!) made the progress I had hoped to achieve, I can't help but wonder how much easier the process might have gone for me had I been aware of an adaptive change diagnostic tool, theories about adult development, and concepts I could use to challenge long-held beliefs about my world. These resources certainly would have helped me understand why I was struggling to make the change I wanted for my career. It's now clear to me how despite consistently networking with professionals doing the work I wanted to do, developing lists of actions to drive my goals forward, and taking classes to expand my skills, I still could not achieve my goals.

As previously shared, I would like to help others work toward achieving their mid-life career goals and to share my personal story and reflections from my learnings. To do that effectively, I first need to provide some background on the Immunity to Change™ concept, the stages of adult development and the diagnostic tool that brings it all together. Some people may regard it as a difficult concept with many intricate parts that must come together for the real change to take hold. My intention is to do my best to make this learning painless and to bring it to life with my own personal stories of vulnerability. I also share details of key concepts on emotional agility that helped me

navigate my thoughts, feelings, and self-talk during a period of significant change in my life.

Introducing the Immunity to Change™ Concept

Encouraged by Dr. Charline Russo, the instructor leading my Capstone class and the UPenn Organizational Dynamics faculty member who would become my Capstone advisor, I enrolled in the Minds at Work Immunity to Change™ Mapmaking for 1:1 Coaching workshop in 2020 to better understand the Immunity to Change™ mapping process developed by Robert Kegan and Lisa Laskow Lahey (2009). I participated so I could explore using the diagnostic tool to understand what prevented mid-life career professionals from carrying out the changes they wanted for their personal happiness. During this 5-week virtual session, I learned how to guide others in creating powerful Immunity to Change™ maps in one-on-one coaching relationships, how to distinguish between technical and adaptive challenges, and the shift in mindset required to make an adaptive change, applying an approach in creating safe, useful experiments that can help to shift a limiting mindset. My goal of taking this course was to gather research for my Capstone and learn more about guiding others with mid-life career goals. I quickly became excited by the opportunity to use the Immunity to Change™ map to reflect on my own mid-life career journey to date.

Kegan and Lahey (2009) introduced the concept of immunity to change in their pioneering work, which began with developing an understanding about the real reasons why people won't change. Like a vaccine that builds immunity to the flu, they believe "unquestioning acceptance of a big assumption anchors and sustains an immunity to change" (Kegan & Lahey, 2001, p. 15). Their research is based on the concept that an

individual's world view is affected by experiences that occur early in life. These experiences become assumptions that shape how individuals see the world. Rarely, if ever, do they stop to examine or challenge them. These steadfast views create what the authors refer to as an "immunity to change" (p. 2).

Kegan and Lahey have applied these research learnings to design a diagnostic tool—The Immunity Map—that helps uncover the big assumptions that get in the way of one's ability to change. The tool can be used to encourage individuals to challenge life-long assumptions and introduce a new way of thinking that can identify why individuals engage in behaviors that contradict their own stated commitments and goals. While not specific to career change, the Immunity to Change™ diagnostic framework has been proven effective in understanding the hidden dynamics that adults use to make meaning and, as a result, prevent change in their lives (Kegan & Lahey, 2009).

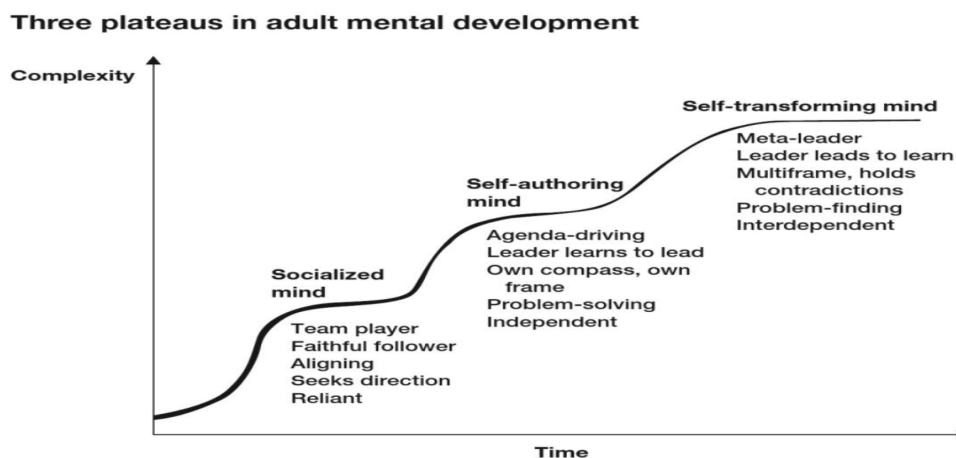
Kegan and Lahey (2001) define a competing commitment as a subconscious, hidden goal that conflicts with a stated commitment (p. 2). Competing commitments make people personally immune to change. It's important to note that competing commitments are not weaknesses but instead represent self-protection from big assumptions (p. 13). They define big assumptions as "deeply rooted beliefs individuals have about themselves and the world around them" (p. 13). These assumptions have an impact on the way an individual behaves and makes decisions. Assumptions can act like blinders, allowing an individual to see some data and be blinded to other available data. These "competing commitments grow from assumptions, driving behaviors unwittingly designed to keep the picture intact" (p. 13).

In simpler terms, it's useful to think of your immune system and the things we do to keep it functioning well—sleep, diet, physical activity, social interactions. Just like we have a *physical* immune system that activates to protect us when medically threatened, we also have a *psychological* immune system that jumps in to protect us when we feel psychologically threatened. While we are often unaware of this mechanism, it holds us back and prevents us from moving forward in our lives, in our work, and in relationships.

Understanding the Stages of Adult Development

Kegan and Lahey (2009) designed a map making process or x-ray that helps individuals see a picture of this invisible energy that prevents us from moving forward. The Immunity to Change™ map making process hinges on an individual's mental complexity or adult development stage and the ability to distinguish between technical and adaptive challenges. Kegan's research on development theory (1997) includes five stages, but I focus on stages three through five of the adult stages of development (see Figure 1). "These three adult meaning systems—the socialized mind, self-authoring mind, and self-transforming mind—make sense of the world, and operate within it, in profoundly different ways" (Kegan & Lahey, 2009, p. 16).

Figure 1. Three Stages of Adult Development



Kegan (2009) describes these three adult plateaus. The socialized mind refers to the period of development beginning in adolescence as we become more a part of society, more trustworthy, and more responsible. With respect to the socialized mind, Kegan (2009) shares:

- We are shaped by the definitions and expectations of our personal environment.
- Our self-coheres by its alignment with, and loyalty to, that with which it identifies.
- This can express itself primarily in our relationship with people, with “schools of thought” (our ideas and beliefs) or both. (p. 17)

According to Kegan, we start to shape our own personal ideology in the self-authoring mind phase and begin to become our own person. With respect to the self-authoring mind, Kegan (2009) notes:

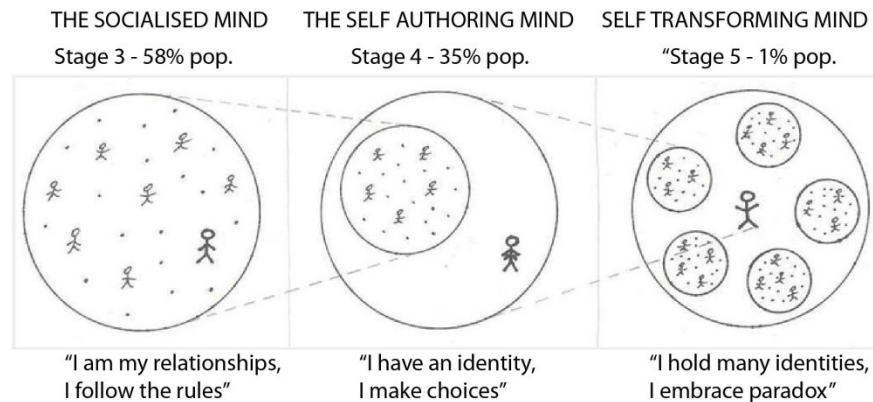
- We are able to step back enough from the social environment to generate an internal “seat of judgment” or personal authority that evaluates and makes choices about external expectations.
- Our self coheres by its alignment with its own belief system/ideology/personal code; by its ability to self-direct, take stands, set limits, and create and regulate its boundaries on behalf of its own voice. (p. 17)

Additionally, we typically enter the self-transforming mind phase in mid-life as we learn to resolve new kinds of challenges we face. With respect to the self-transforming mind, Kegan (2009) adds:

- We can step back from and reflect on the limits of our own ideology or personal authority; see that any one system or self-organization is in some way partial or incomplete; be friendlier toward contradiction and opposites; seek to hold on to multiple systems rather projecting all but one onto the other.
- Our self coheres through its ability not to confuse internal consistency with wholeness or completeness, and through its alignment with the dialectic rather than either pole. (p. 17)

Figure 2 provides a visual depiction of Kegan’s constructive development theory.

Figure 2. Constructive Development Theory



Excerpt: Constructive Development Theory - Robert Kegan "In Over our Heads"

A key component of advancing through the phases of adult development is the ability to see, reflect, and adapt to what Kegan refers to as the "subject-object" shift in mindset (p. 22). Kegan & Lahey (2009) add:

The complexity of a mindset is a function of the way it distinguishes the thoughts and feelings *we have* (i.e., can look at, can take as object) from the thoughts and feelings that *have us* (i.e., we are run by them, are subject to them). Each level of mindset complexity draws the line differently between what is the subject and what is the object. Greater complexity means being able to look at more (take more as the object). The blind spot (what is the subject) becomes smaller and smaller (p. 22).

As we move through the phases of adult development, we become more aware of our blind spots, learn to live with paradox, and make meaning in more complicated experiences. I believe, regardless of the stage of our development, we all live with assumptions and beliefs that make it difficult to see past our own subjective experiences. Simply stated, it's hard to remain objective and not allow past experiences to cloud new situations. By mid-life we have gathered years of knowledge and experience that can serve us well. This data we have collected during our lifetime can help us avoid costly

mistakes, save time, and perhaps even prevent us from harm. We have been around the block once or twice. (Who's counting?) This should be a good thing, right? Yes and no.

As humans we can overuse the meaning we perceive from our own experience and give little thought to the implications of this limited view of the world. In this fixed state of mind, we lose our ability to remain curious and open to learn and grow as adults. We can be blind to our own unconscious biases and create work environments that lack diverse contributions and equitable advantages for our peers. We can avoid asking others to collaborate and share advice because it's easier to save time with the tried and true rather than experiment with a new approach—or admit we don't have all the answers. In our personal lives we may stick with family traditions that no longer hold meaning for us to bring us joy.

This distinction between the subject and the object becomes increasingly important as individuals engage in the Immunity to Change™ map making process and contemplate the steps necessary to evaluate and act on adaptive versus technical challenges. Kegan's (2009) work suggests these adaptive challenges can only be met by transforming our mindsets and advancing to a more sophisticated stage of mental development. Adaptive challenges require individuals to change mindsets, beliefs, and behaviors, as well as uncover thoughts and feelings that have a hold over us. In contrast, technical challenges focus on becoming skilled in a functional competence such as learning to cook, gaining skills to sail a boat, or writing a better resume. Where we get stuck repeatedly is most always our adaptive challenge.

Navigating Mid-Life Career Change with Emotional Agility

The good news is, according to psychologist Susan David (2016), adults can increase their capacity for ongoing development when they learn to live in a dynamic, complex world and demonstrate flexibility. David (2016) refers to this capacity as emotional agility, a way to “keep a sense of challenge and growth alive and well throughout your life” (p. 14). David (2016) explains:

Emotional agility is a process that allows you to be in the moment, changing or maintaining your behaviors to live in ways that align with your intentions and values. This process isn’t about ignoring difficult emotions and thoughts. It’s about holding those emotions and thoughts loosely, facing them courageously and compassionately, and then moving past them to make big things happen in your life. (p. 10)

David’s (2016) emotional agility research has identified common “hooks” that lead us to slip into default mode, think or behave in a particular way, apply our own rules of thumb, and therefore be less open to new opportunities. These “hooks” can manifest as “thought blaming” or relying on thoughts or old stories to drive our behavior; “monkey – mindedness” or developing only the worst-case scenarios about a situation; “old, outgrown ideas” that represent outdated thinking that doesn’t serve the present time or situation, or “wrongheaded righteousness” that may drive us to compromise anything good for a desperate need to be right (pp. 35-40). I believe many men and women cling to similar “hooks” and, as a result, don’t act on their mid-life career change goals. These mid-life career professionals might be hooked to the idea that given their age they won’t have time to course correct if they fail along with the change or they will expose themselves to the risk of potential loss of long-term financial incentives if they were to make a change in job, career, or employer.

I can see now with reflection and learning that my own mid-life career change “hooks” held me back from making a change. After all, I was in my mid-40s so perhaps my opportunity for a move had expired. The “thought blaming” told me I settled in and waited too long to make my move. It wouldn’t be long before my “monkey-mindedness” stepped up to tell me that although my daughters were out of daycare, they were still active and needed rides to activities. Why would I seek a new career path at this stage of my life when my family had so many personal commitments? I clung to “old, outgrown ideas” about career progression and risks and stayed hooked to the thought that I really didn’t have all the qualifications yet for that new job I wanted. So, who would really hire me now? I mean, look at all the qualifications on that job description I don’t have yet! Will I ever? “Wrongheaded righteousness” made me think it would be much easier to stay put with my current employer. Who cares if I was bored? I was getting paid well, right? Just wear those golden handcuffs and stay hooked, Kim.

For this reluctant mid-life career change heroine, staying hooked on this “wrongheaded righteousness” also meant I was serving myself up a healthy dose of “rainbows and unicorns” each day. David (2016) might describe my behaviors as a “tyranny of positivity” that encouraged me to ignore my difficult emotions and how they were acting as “sign posts” signaling what mattered most to me. Instead of exploring my feelings of boredom and sleuthing out what I valued in my career, I was doubling down on the silver linings and living in denial.

Given my family of origin, it’s not surprising that I kept my focus on the positive. I was raised to be strong and focus on the good, not dwell on the negative. When I still phone my well-intentioned dad today, he will answer by saying hello and then quickly

ask, “What’s good?” I’ve been exposed to a filter of “grinning and bearing it” for a lifetime. Let’s be honest, a positive outlook can serve us well. We all need hope and promise in our lives. However, ignoring our feelings of discomfort and hoping they pack up and move to another doorstep isn’t very realistic. Instead, we need to connect with these difficult emotions. As noted by David (2016), “Our raw feelings can be the messengers we need to teach us things about ourselves and can prompt insights into important life decisions” (p. 61). I guided myself to bury the feelings I was experiencing and focus on the positive aspects of the current state of my job as I navigated my mid-life career goals. The boredom I was feeling was a “sign post” telling me that I value learning and growth and a challenge—all that was lacking in my current role David adds (2016):

Identifying and acting on the values that are truly your own – not those imposed on you by others’ not what you think you should care about, but what you genuinely do care about – is the crucial next step of fostering emotional agility. (pp. 114-115)

My feelings of boredom drove my desire to want a career change in mid-life, and the hooks kept me from acting on that goal.

The Making of My Immunity to Change™ Map

As described earlier, the diagnostic tool Kegan and Lahey designed is referred to as a map making process; the output is an x-ray of one’s immunity to change. Used with bravery, curiosity, and a healthy dose of self-acceptance, the exercise can expand your self-awareness and release you from the torment of not knowing why you can’t achieve a goal that is so very important to you. The tool can be used in a coach and client relationship, with peers, as a team, or by yourself. I share how I used the map as a tool for self-reflection to better understand my own immunity to mid-life career change.

At first glance the map is relatively simple—a table with four columns. However, when approached with honesty and commitment to your goal, those four columns help identify and overcome the limiting beliefs, fear, and assumptions that create an immune system that takes hold. Kegan and Lahey (2009) paint a vivid picture of us driving forward with one foot on the gas and one foot on the brake—we are effectively going nowhere despite our greatest desires to get somewhere:

You can see yourself with a foot on the gas (genuinely and urgently wanting more success with the goal you have entered in column 1) and a foot on the brake (actively and continually producing those behaviors that most likely prevent any progress on that goal). And you can see the very good reason you are holding yourself back: You want to save your life as you know it. You can see, in your third and fourth columns, the reasons why every one of those obstructive behaviors feels necessary for your self-protection. (Kegan & Lahey, 2009, p. 253)

Column 1: How to Clarify Your Goal

In Column 1 of the Immunity to Change™ map framework, (Kegan & Lahey, 2009, p. 57) we are directed to define our adaptive goal—not technical goal. Coaches who use the mapping tool with a client should allow the participant the time to carefully think about a goal that they really want, may have wanted for a while but either can't seem to gain traction on, and/or have a wide gap from where they are now and where they want to be. The goal must be true for them, have a sense of urgency, and implicate them—not anyone else. For example, this goal is not about changing anyone else (i.e., your annoying roommate, your nagging mother, your unorganized teenager). You or your client may also want to seek some objectivity and ask others in your personal and professional circles if they agree that this goal would make a real difference to others in your life, as well as your own. The goal definition may seem simple but is not to be taken lightly. It is recommended that the goal rank at least 4 or 5 on a 5-point scale of

importance. Finally, the goal you place in Column 1 sets the stage for the entire mapping process. Make sure the goal is one that you or the client is excited about achieving, is meaningful, and would make a big impact to their (or your) life.

Kim's Column 1 Goal

My goal that drives my Immunity to Change™ map takes shape during the time I committed to the MSOD program in 2015. I was entering that stage of mid-life that Brown (2010) refers to as an unraveling:

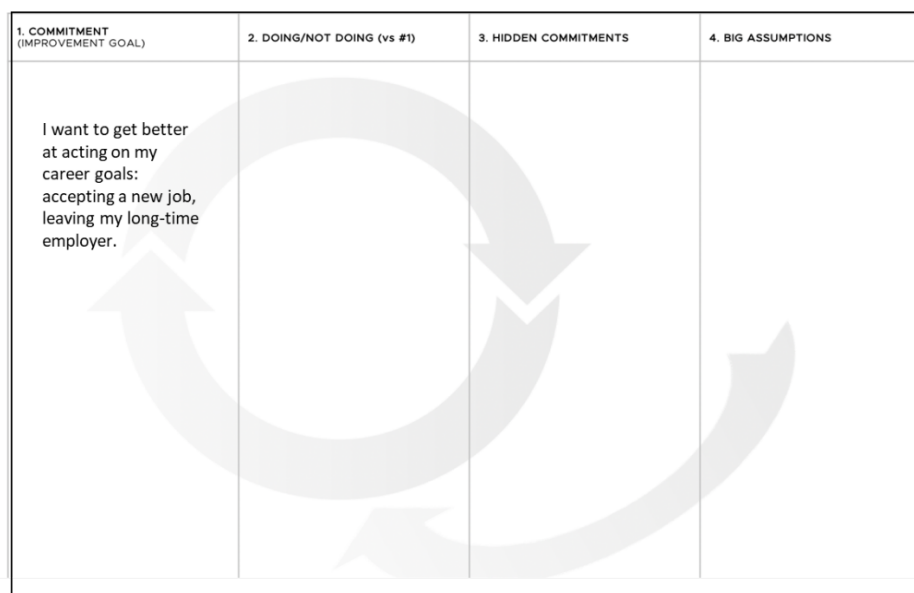
A time when you feel a desperate pull to live the life you want to live, not the one you're supposed to live. The unraveling is a time when you are challenged by the universe to let go of who you think you are supposed to be and to embrace who you are. (pp. xii-xiii)

I was experiencing my own unraveling. My daughters had grown to an age in which they were more self-sufficient and needed me less. I had survived and succeeded through a large corporate merger, but the excitement had worn away. I wasn't challenged in my job; I was searching for something more and committed to continuing to grow in my career. I desperately wanted to apply the new knowledge I was gaining in my MSOD classes. I wanted to take on an organizational development role in diagnosing and developing corporate culture. Now that my daughters were older, out of daycare, and able to be home by themselves, I was considering leaving my company, which was located around the corner from my house. My Column 1 adaptive goal was all about making a move toward that next career challenge accepting a new role at my current employer or finding a new job outside my company to follow my work interests.

While in the Minds at Work workshop, I learned a goal can be guided to become adaptive by adding these four words in the front: "I want to get better at..." Here are some examples: I want to get better at accepting feedback. I want to get better at using

humor in the workplace. I want to get better at having difficult conversations. For me, I defined my commitment or improvement goal as I want to get better at acting on my career goals by accepting a new job and leaving my longtime employer (see Figure 3).

Figure 3. Kim's Immunity to Change™ Map, Column 1



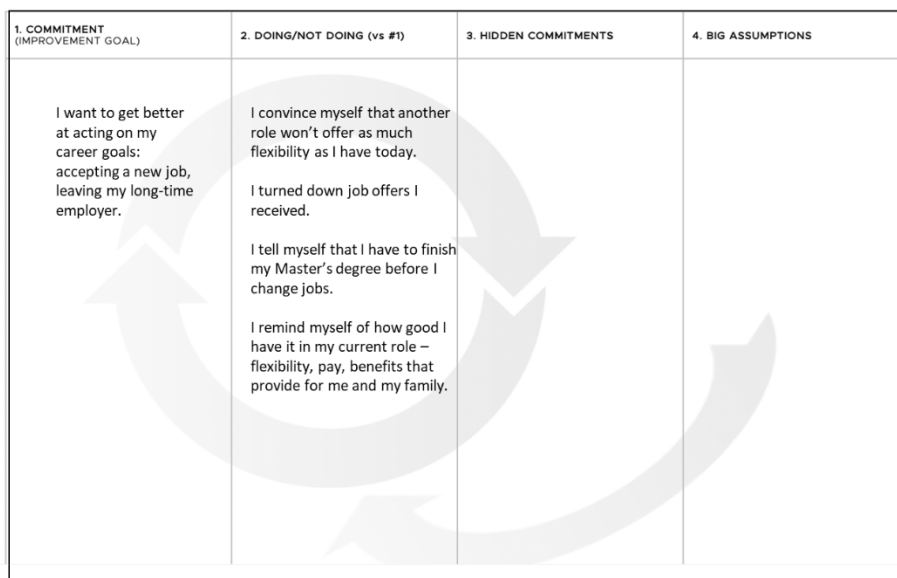
Column 2: Take Inventory of Your Actions and Behaviors

With the goal defined, we get to work on the next step of the map. However, the work may be a bit different than what an Immunity to Change™ first-timer might expect. You won't start plotting a plan to achieve the defined goal in Column 1. Instead, Kegan and Lahey (2009) ask us to begin to define the behaviors that have the power to change or impact our commitment goal defined in Column 1. Here, you tattletale on yourself and capture all the actions you do or don't do—the behaviors that work against your goal. As humans we have a natural tendency to identify negative feelings about not taking actions to advance our goals so, as a result, we may want to start to solve the problem and enter solutions in Column 2. Coaches working with this tool should guide the client away from

both listing their emotions and generating solutions. Instead, direct them “to tell on themselves” in this column. One of my favorite techniques for telling on ourselves, which I learned in the Minds at Work workshop, is to ask yourself or a client: “If I were to replay a video of you over the last few weeks or months, what would I see? What behaviors would play out that are keeping you from realizing your Column 1 goal?” Most likely these behaviors and actions are things that “need to go away” to achieve the Column 1 goal. This fearless inventory exercise of observable behaviors or clues gives you insights on what you will do to keep from achieving your Column 1 goal.

Kim’s Column 2

Now it was my turn to tattletale on myself. With some retrospective thinking, my snitching started and gained momentum. As you can see from the behaviors listed in my Column 2 in Figure 4, I was very effective at carrying out behaviors that prevented me from achieving my goal.



1. COMMITMENT (IMPROVEMENT GOAL)	2. DOING/NOT DOING (vs #1)	3. HIDDEN COMMITMENTS	4. BIG ASSUMPTIONS
I want to get better at acting on my career goals: accepting a new job, leaving my long-time employer.	<p>I convince myself that another role won't offer as much flexibility as I have today.</p> <p>I turned down job offers I received.</p> <p>I tell myself that I have to finish my Master's degree before I change jobs.</p> <p>I remind myself of how good I have it in my current role -- flexibility, pay, benefits that provide for me and my family.</p>		

Applying Kegan's (2009) theory for adult development, I believe some of my behaviors at the time were influenced by a socialized mindset and a *group think* mentality that affected how I received information and made meaning—similar to how one may pick up beliefs and behaviors from family, educational institutions, or religions. I was allowing my mindset to be shaped by the culture in my work environment. I had goals and aspirations for my career; yet, I was afraid to take actions because I was influenced by the values of my colleagues, managers, and leaders. I worked in an organizational culture that regularly sent me messages that I was employed by the top innovative leader in my industry. I was coached by managers to write my development plan with a focus on a tenured career with my employer versus a career in a discipline or practice. My career goals and beliefs were shaped by that definition of success, and I believed any actions I took to leave my employer or to switch roles internally could put me at risk of losing my employment and, ultimately, my career identity—even if the move was intended to provide me with new work challenges that could advance my career goals. I had well-intentioned family and friends around me who also influenced my thinking by questioning me about why I would want to take on a new role, commute, added responsibilities as a working mom, and risk “starting” over in a new role with a new and less reputable company.

If you were to replay the video of my actions in Column 2, you would also see me traveling to the UPenn each semester to take classes and be invigorated by acquiring new knowledge, meeting new people, and exploring ideas of working in a new role to advance my development. I was excited by what I was learning in my MSOD studies; that experience was fulfilling my interests and masking the boredom I felt in my job. As a

result, this experience delayed any urgency I felt in acting on my goal. On that same video clip, you might hear me reminding myself how great my current role was for my bank account and my work/life balance. I was getting paid well and could work from home.

The video turns to an action adventure when you see some of my behaviors were blocking and tackling my goal. For example, turning down a new job I was offered—not once but twice. One was from my current employer, and another offer came from a new company. Say what?! This behavior proves I was facing an adaptive challenge that could not be solved with a technical challenge in simply applying for and receiving a new job offer. I didn't stop there. I arbitrarily created a self-imposed rule (made from the “old outdated thinking” hook I spoke of earlier) that hereby governed the career of Ms. Kimberly M. Robbins shall not advance until she is finished with her graduate studies. Sounds ridiculous, doesn't it? Because it is! But, as ridiculous as it sounds, it gave me more time to find a role exactly where I was—with my current employer—and prevented me from having to face the doubts and anxiety I had about leaving my industry leading employer. It also shielded me from any need to consider a lateral move, which I believed would imply I couldn't really achieve my goals of advancing my career up the ladder.

I reveal more about the emotions uncovered in Column 2 when I discuss what I learned in Column 3 in terms of defining the competing commitments we cling to that prevent us from feeling these emotions or the fear associated with doing the opposite of our Column 2 actions. These emotions provide insights on what was really preventing me from acting on my career goals; these were my fears and competing commitments

holding me back from what I really wanted—an opportunity to grow my career and carve a new path for myself in my mid-40s.

Column 3: Naming Your Fear and Competing Commitments

I find the words of both Brown (2010) in her TED Talk entitled “The Power of Vulnerability” and Kegan and Lahey (2009) useful in describing Column 3—the moment is part “spiritual awakening” and part “oh, shit.” Why, you may ask? Column 3 is where you capture your biggest fears and your competing commitments. You or your client will dig into Column 3 by reviewing the actions and behaviors in Column 2 and begin to imagine how you would feel if you stopped doing those things. Here is where we identify the fear, discomfort, or sense of loss that surfaces when we think about advancing our goal. We consider what can “go wrong” in working to achieve our goal. Remember that one foot on the gas and one foot on the brake expression I mentioned earlier? This is that picture coming to life for you in Column 3. Warning: It’s likely this exercise will be uncomfortable for you or your client. If the items listed in Column 3 do not feel good, that means you or your client is doing the honest work to break an immunity to change. In my experience you need to resist the urge of just scratching the surface here and give yourself the gift of sitting with some discomfort to really uncover your fears. As noted by Kegan and Lahey (2009), “If you do not take this to sufficient depth, the map you come up with will not have enough power. If you haven’t located a genuine ‘oh, shit’ kind of feeling, you are probably not there yet” (p. 238).

Perched at the top of Column 3 sits the worry box where you will list or summarize your biggest worry. What you or your client places here will define an image that is upsetting and worrisome. Kegan and Lahey (2009) point out that “you need to get

to a place where you feel yourself at risk in some way; where you are unprotected from something that feels dangerous to you” (p. 238).

In the Minds at Work workshop I learned this worry can also be a loss of a desired image, which was the case for me, and I’ll describe this example more in a moment.

During the Minds at Work workshop, we reviewed some common worries, which may include:

- I’ll feel stupid.
- I’ll feel weak, ineffective.
- I won’t look good.
- People won’t like me.
- I’ll feel useless.
- I’ll be a loser.
- I will fail.
- I’ll be seen as controlling, a micro-manager.
- I’ll lose my feelings of being superior.
- I’ll be vulnerable, open to rejection.
- I’ll make other people uncomfortable.

Given the recent events that have occurred in the world related to the global coronavirus disease 2019 (COVID-19) pandemic, social injustice, and political unrest, I’m sure we could all easily add to this list of common worries.

Once you or your client has generated a healthy list of worries, take a moment to review and summarize that worry into one statement, using guidance from Kegan and Lahey (2009):

The ‘Eech’ and the ‘Yuk’ are important. The goal is to locate an actual loathsome feeling, not just a thought or idea about an unpleasant feeling. The goal is to let yourself vicariously experience a little of this feeling, and only then to put that feeling into words. (p. 238)

Below your worry box are competing commitments. These hidden or competing commitments are how we expend energy to keep from feeling the things in the worry box. In the Minds at Work workshop, I learned these hidden commitments, specifically, preserve the danger from the worry box. They show a commitment to self-protection and are not noble. For example, this level of honesty may reveal your commitment is not to protect someone else or save the world. The hidden commitments show why Column 2 behaviors make good sense; they exist in tension with Column 1. They also show why your immune system feels powerful (ranking as 4 or 5 on a 5-point scale).

The purpose of Column 3 is to identify hidden competing commitments and unpack why the behaviors in Column 2 are happening or are continuing to persist to prevent you from achieving your Column 1 goal. Once you see these competing commitments, you may feel a bit perplexed and wonder how you let this personal self-sabotage carry on. Kegan & Lahey (2009) remind us that we are merely carrying out self-protection, noting the method to what we may feel is our self-directed proverbial madness.

The idea behind the immunity to change is that we do not merely have these fears; we sensibly, even artfully, protect ourselves from them. We create ways of dealing with the anxiety that these fears provoke. We are not only afraid; we take action to combat our fears. We defend ourselves from what terrifies us. We are actively (but not necessarily consciously) committed to making sure the things we are afraid of do not happen. (p. 241)

Can we really be this irrational and not recognize it? The short answer is “Yes!”

You might feel better when you consider these words by author Shankar Vedantam (2021): “One reason people cling to false beliefs is because self-deception can sometimes be functional—it enables us to accomplish useful social, psychological, or biological

goals. Holding false beliefs is not always the mark of idiocy, pathology or villainy” (p. xviii).

Kim’s Column 3: Naming My Fear and Competing Commitments

In Column 3, I identify what I believe most individuals committed to achieving their improvement goal will see: how they are allowing their fears to take full control of setting the agenda for their Column 1 goal. This is how I experienced the work of defining my competing commitments and biggest worries, as demonstrated in my Immunity to Change™ map (see Figure 5).

Figure 5. Kim’s Immunity to Change™ Map, Column 3

1. COMMITMENT (IMPROVEMENT GOAL)	2. DOING/NOT DOING (vs #1)	3. HIDDEN COMMITMENTS	4. BIG ASSUMPTIONS
I want to get better at acting on my career goals: accepting a new job, leaving my long-time employer.	<p>I convince myself that another role won't offer as much flexibility as I have today.</p> <p>I turned down job offers I received.</p> <p>I tell myself that I have to finish my Master's degree before I change jobs.</p> <p>I remind myself of how good I have it in my current role – flexibility, pay, benefits that provide for me and my family.</p>	<p>Worry Box</p> <p>This is the best job I can get with my skills and experience.</p> <p>I'm also committed to:</p> <ul style="list-style-type: none"> • Not making a change I will regret. • Not losing work/life balance. • Not admitting that I have outgrown my current role and am BORED. • Maintaining my job level status with a “premiere” employer. • Not being vulnerable. • Not admitting that I am stuck in my career journey at my current employer. • Wanting to practice new skills I've gained from my Master's studies. • Not taking a pay cut. • Staying in a comfortable environment. 	

These false beliefs—namely, the competing commitments upending me on my path to my goal—were not apparent to me until I reached Column 3 and took the time to thoughtfully reflect and get uncomfortable. Until I invested in that time for myself, I was wrapped up in the pace of my life as a working parent and my tendency to be a task master. The values I adopted from coworkers, family, and friends around me and the

effects of living in a professional environment in which I was rewarded for getting lots of “things done”—instead of pausing to make time to understand who I had been, who I was today, and who I wanted to be at this next stage of my life and career journey—contributed to my understanding of me.

Looking at my competing commitments, we can see how they served to protect me from my biggest worry, which demonstrates why my Column 2 behaviors make sense. A few of my competing commitments served my ego and how I defined my worth.

For example, I was committed to:

- Not making a change that I would regret
- Maintaining my job level status with a “premiere” employer
- Not admitting I am stuck in my career journey at my current employer
- Not admitting I have outgrown my current role and am BORED
- Not being vulnerable
- Wanting to practice new skills I’ve gained from my master’s studies

As a result, as stated in Column 2, I turned down both internal and external job offers and told myself that I had to finish my MSOD before I could make a job change because I didn’t want to find out that my worry was indeed true. By not taking the risk associated with accepting a job, I could avoid learning if (1) my professional success as a survivor at my current company was a fluke, (2) I didn’t have the skills to take my career in a new direction, and (3) I would never advance from my job level at my current employer.

My other competing commitments were built to protect my well-being and bank account. These commitments were identified as not taking a pay cut, not losing my

work/life balance, and staying in a comfortable environment. Many mid-life career professionals are reluctant to leave organizations after having accumulated incentive packages such as pension plans, stock options, and delayed compensation schemes (Entine, 1977; Souerwine, 1977). While a lack of financial resources and family responsibilities can restrict behavior (Morrison, 1977), I am fortunate that my husband and I earn very equal compensation and rewards, despite our education and technical roles being quite different. I'd be lying if I didn't call out how it irritated me when friends and family assumed my earnings were significantly less. The potential risk of losing my high paying salary and benefits was of concern to me and a very real part of my immunity to change. I realize now that I had placed a lot of value on how others perceived me versus what I believed I could achieve outside my current company.

My Column 2 actions included ongoing self-talk and elements of the socialized mind taking hold with chatter among family, friends, and coworkers that never once considered the proverbial grass could actually be greener and afford me a pay increase, more flexible working arrangements, and an equal or more pleasant work/life balance. These factors fed my beliefs as previously explained in my Immunity to Change™ map and made it difficult for me to make decisions to act on my career goals. I placed a lot of importance on being perfect, fitting in, and caring about what others thought of me. The thought of leaving a role I knew so well could expose me to feel imperfect, isolated, and nervous. This fear was very real to me. I was stuck in a circle going nowhere.

After I had completed the hard work in Column 3, the x-ray revealed my immunity to change at work. At the heart of my competing commitments was my fear of jeopardizing how I viewed myself—successful for maintaining my job at a large, well-

known company after a series of downsizings, reorganizations, and mergers and acquisitions. While I was invested in maintaining this definition of success, I also wanted to find more challenging work and a path toward taking my career in another direction. I worked for the largest global company in my industry and felt a great sense of pride to be part of the corporate mission. Maintaining a survivor status was an unwritten and unspoken value of my employer. This traditional view on a career that promises long-term job security and career ladders in exchange for hard work and loyalty is no longer the norm. People work longer in unpredictable work environments, will have more than one organizational context in their career, and must take more responsibility for managing their career and the meaning they derive from their career (Vos & Heijden, 2017). During the 14 years with my employer, I identified new goals for my career journey and, like other mid-life career professionals, attached different meaning and values to career-related decisions (Vos & Heijden, 2017).

For years I clung to the idea that the career I had— job, employer, total rewards— was the best I was ever going to get. Sure, I succeeded in the role I was in for years, but how would I perform in a new role? If I changed jobs, I was self-conscious that I could be exposed as a “one-hit wonder.” Would a new environment leave me exposed as the phony I really am? Parts of me felt abandoned by the corporate culture. I had received annual reviews that described me as a top performer. I was confused by how I couldn’t carve a career path for myself—to get where I wanted to go. Yet, the reality is greater numbers of older workers are in the workforce, and most people no longer follow a linear career path (Sterns & Huyck, 2001).

When I was passed by for the roles I wanted and encouraged to think about other paths, it was much easier to blame my current organization for not taking a chance on me than it was to take a chance on leaving my employer to work in the roles I really wanted at another organization. I was willing to go around and around in this circle—even if it meant settling for less than what I truly wanted for my career. The hard, self-reflective work I did in Column 3 acted like an x-ray, helping me see the mental roadblocks I was unknowingly creating. If I were to accept another role or move to a new employer, what would feel most uncomfortable about that? These were my worries, fears, and competition commitments—the opposite of my Column 2 behaviors. Just like how an x-ray helps to diagnose, monitor, and treat a physical condition, the mapping process helped me understand how to address the counterproductive energy I was drawing from daily. It revealed “a schematic representation of the way I was handling a constant, unrecognized anxiety running through my life” (Kegan & Lahey, 2009, p. 48).

It’s important to remember that this immune system is aptly named. It is well-intended and protective. It seeks to identify anything that will cause us harm. My experience demonstrates how our minds can get it wrong; we can identify danger that doesn’t exist or danger that our immune system thinks we can’t handle. These hidden commitments protect us from the perceived danger based on experiences that occurred earlier in our lives so we expend a lot of energy to avoid realizing the unpleasant feelings we worry about by altering our behavior to avoid fully realizing our greatest dread. This paradox of energy (one foot on the gas and one foot on the break, are you with me?!) against our goal keeps the immune system powerful and keeps us from achieving our goals. In my case these competing commitments were preventing me from losing my

flawed sense of identity and worth. They were also holding me back from what I really wanted—an opportunity to grow my career and carve a new path for myself in mid-life.

I had been so focused on maintaining behaviors that ensured my view of the world of success for myself—staying in a job I knew well, being paid well, and offering me brand name employer recognition. I wasn't willing to invest in behaviors I viewed as risky and could possibly lead me to an outcome that would put me in danger of losing my personal definition of success. I was afraid of making the move to leave my employer and setting in motion steps for meeting my greatest fear—this was the best job I could get with my skills and experience. Yet, at the same time, my job of 10-plus years served as my safe haven, protecting me from realizing that fear. Until one day I realized it wasn't my safe haven anymore.

I felt tired of waiting for that perfect role at my current employer. I was placing my career goals and destiny in their hands, and if I didn't start acting I was playing a martyr and allowing that fear to become reality. In the Minds at Work workshop, I learned that crisis often pushes us forward on our change journeys, which was true for me. I tell you more about a round of organizational changes that prompted me to challenge my fears and open doors to test my assumptions in Chapter 4. I gifted myself with the opportunity to create new meaning by “being able to look at something that, before, I could only look through. We overcome a kind of blind spot by getting some distance, or perspective, on a way of making meaning to which we had been captive” (Kegan & Lahey, 2009, p. 167). In Column 4 I show you the steps to take back the reins of control.

Column 4: Meet Your Big Assumptions

Actor and director Alan Alda famously said in a Connecticut College commencement address in 1980: “Your assumptions are your windows on the world. Scrub them off every once in a while or the light won’t come in.” Likewise, in the last column of the map, the light will come in when we define our biggest assumptions.

You may ask why they are big assumptions, not just assumptions. They are considered big assumptions because there is a lot hidden in them and they have gained power over time. Through the years of our lives we have developed rule books or mental maps based on our experiences. We use this data or personal baggage (not the designer luggage) to form assumptions and make our meaning. These assumptions cause us to see the world in a certain way and make our worries and commitments seem entirely reasonable. “When we treat an assumption as if it is a truth, we have made it what we call a big assumption” (Kegan & Lahey, 2009, p. 247). However, these assumptions are often distorted and sneaky, prompting us to believe in things that may be true, partially true, or completely fake. These assumptions make it necessary to avoid the fear or dread you or your client has uncomfortably documented in Column 3. In the Minds at Work workshop, I learned these assumptions take the fear deeper and connect us to what we very much believe is a bad conclusion for ourselves and protect us from danger. Most likely these assumptions suggest a limited view of the world. Kegan and Lahey (2009) described the value of Column 4 as follows:

The most reliable route to disrupting the immune system begins by identifying the core assumptions that sustain it. We use the concepts of big assumptions to signal that there are some ways we understand ourselves and the world (and the relationship between the world and ourselves) that we do not see as mental constructions. Rather we see them as truths,

incontrovertible facts, accurate representations of how we and the world are. (p. 246)

Again, in Column 4, you will want to spend a considerable amount of time thinking about your assumptions or helping your client uncover their big assumptions. In the Minds at Work workshop, I learned how the coach can play a critical role in Column 4 by helping the client uncover additional assumptions. As a coach you can support yourself or a client by asking open-ended probing questions such as:

- Do you think you might also believe?
- Do you tell yourself that?
- Does it also seem to be true?

Once again, by applying Kegan's theory for adult development, you can begin to understand how our mental complexity can develop to one of self-authoring when our mind's identify big assumptions and begin "creating a filter for what it would allow to come through. It places a priority on receiving the information it has sought." (Kegan & Lahey, 2009, p. 19).

Kim's Column 4: "Hi Big Assumption. I'm Kim."

As noted at the start of this Capstone, I was struggling with doubt and feelings of anxiety related to leaving my longtime employer and losing all that my current job provided me and my family. I assumed my greatest career experiences and development potential were behind me and that it was foolish for me to try to alter my career journey in my mid-40s. I feared—as stated in my worry box—that this was the end of the road for me, and I don't think I am alone in those thoughts. Figure 6 shows how I explored Kim's Column 4: "Hi, Big Assumptions. I'm Kim."

Figure 6. Kim's Immunity to Change™ Map, Column 4

1. COMMITMENT (IMPROVEMENT GOAL)	2. DOING/NOT DOING (vs #1)	3. HIDDEN COMMITMENTS	4. BIG ASSUMPTIONS
<p>I want to get better at acting on my career goals: accepting a new job, leaving my long-time employer.</p>	<p>I convince myself that another role won't offer as much flexibility as I have today.</p> <p>I turned down job offers I received.</p> <p>I tell myself that I have to finish my Master's degree before I change jobs.</p> <p>I remind myself of how good I have it in my current role – flexibility, pay, benefits that provide for me and my family.</p>	<p>Worry Box</p> <p>This is the best job I can get with my skills and experience.</p> <p>I'm also committed to:</p> <ul style="list-style-type: none"> • Not making a change I will regret. • Not losing work/life balance. • Not admitting that I have outgrown my current role and am BORED. • Maintaining my job level status with a "premiere" employer. • Not being vulnerable. • Not admitting that I am stuck in my career journey at my current employer. • Wanting to practice new skills I've gained from my Master's studies. • Not taking a pay cut. • Staying in a comfortable environment. 	<p>I assume that:</p> <ul style="list-style-type: none"> • My greatest career experiences, development potential are behind me. • I am not qualified for the roles I want. • If I make a change and don't like job or company, I'll be stuck there. • The risk of changing my employer isn't worth the reward. • A new job won't provide all that my current roles does.

Column 4 allows you or your client to stretch their minds to advance into the stages of the self-transforming mind in which “it is aware that it lives in time and that the world is in motion, and what might have made sense today may not make as much sense tomorrow” (Keegan & Lahey, 2009, p. 20). It is here in this column of the map that you begin to seek diverse perspectives that challenge your frames of meaning and use that data and information to reset, discount, and/or improve the ways you make meaning in your life.

Spoiler alert: The good news is my journey led me to testing these big assumptions. The first test would prove my greatest career experience and development potential was not behind me. The second test would prove if I was qualified for the roles I wanted. The third and fourth tests (tested in Chapter 4) would assess if I made a change

in my job or company, would I be stuck there? They also helped me gather data to understand if a new job would provide all that I had enjoyed in my current role with my longtime employer. In Chapter 3 I begin to share stories about how I tested my assumptions, the lessons I learned to release myself from these hooks, and how I applied those learnings to go on to achieve my Column 1 goal.

CHAPTER 3

TESTING MY ASSUMPTIONS AND PUTTING MY NEW LEARNINGS TO WORK

The curious paradox is that when I accept myself just as I am, then I can change.

—Carl Rogers

I have used the Immunity to Change™ map to reflect on my mid-life career change journey and share learnings from my unique experiences. I now share my stories of how a developmental opportunity enabled me to bring learnings from my UPenn Organizational Dynamics classes to my work. This combination of learning, applying, and testing allowed me to begin testing my assumptions outlined previously. It's important to note that my assumption testing was not exactly what Kegan and Lahey would guide you to do. What was right for me may not be right for you or your client. That's okay. It was the right time for me to start making some bold moves. I was ready, and my experiences provided an opportunity to determine if my assumptions, or windows to my world, were so cloudy I could no longer see reality.

The opportunity to test my assumptions was presented when my longtime employer moved my department into a new organization. I learned our team would be reorganized soon, and a new team leader position would be created. I realized this was my chance to move up the ladder, even if it wasn't the work that excited me. Around that same time additional organizational changes were taking place, and a developmental assignment was created to support a culture change initiative for a C-level executive. It was a lateral move but the *exact* work I wanted to be doing; it had a reporting line to the

Human Resources leader consulting the C-level executive. It was my opportunity to work in a role in which I could apply my learnings from my MSOD studies and start to “walk my why”—namely, live by my values, beliefs, and behaviors that give me meaning and satisfaction (David, 2016, pp. 114-115). I had to decide whether to stay and apply for a promotion on a team that did the work I wasn’t passionate about or go after the work and role that excited me and not look back.

As with many corporate development assignments, no promise was given that this opportunity would turn into a full-time role. The organization was constantly evolving, which also meant I had no guarantee I would be given an opportunity to return to my old role for a safe landing. It felt risky. Yet, if I continued to play it safe in a comfortable, boring role that offered great benefits and compensation, I would be a faithful follower aligning to the socialized mind I discussed earlier, acting on values I thought I should care about rather than the values I really cared about. I would also be continuing to allow my greatest assumption to pump the gas and brake and keep Kim spinning in an immunity of change—never reaching my career change destination. By acknowledging that I wanted to pursue work I enjoyed, was important to me, and I believed made a difference, I found the courage to act on my values and raise my hand for this development role.

I was making the first of many decisions that weakened my immunity to change. And I was about to test two of my assumptions highlighted in Chapter 2: (1) My greatest career experiences and development potential were behind me, and (2) I am not qualified for the roles I want. Sounds great on paper, but I’d be lying if I said this decision was easy. After I made the decision, I lived up to the title of Reluctant Mid-Life Career

Change Heroine—1 minute I might be cheering myself on for taking the risk and the next minute I might be doubting my decision. The change was getting real for me; I was getting to a place at which I could feel the risk and was exposed to something that felt dangerous to me (Kegan & Lahey, 2009, p. 238).

As I mentioned, taking on a new role, and walking away from a potential promotion, is a big leap from most tests designed to challenge assumptions. In fact, Kegan and Lahey (2009) recommend a “SMART” test (p. 261) designed to gather evidence that helps you understand if your assumption is true or a portion of it might be true under a certain condition. While my experience was a test, it was not safe or modest; it took me into a completely new role in which I was expected to solve problems and drive outcomes. However, the test of entering a new role provided an actionable opportunity for a significant period of time that allowed me to gather data to evaluate my assumptions.

Below are the conditions for conducting a SMART test of your assumptions:

- Safe: The risks are low—meaning you won’t get into too much trouble if something goes wrong while conducting this experiment.
- Modest: This is not a large-scale or lengthy test that exposes you in any way. Here, the stakes are low.
- Actionable: Your experiment should provide you with the opportunity to try on a few different lenses, try out some new behaviors. The work of the experiment is driven by your actions and mindsets.
- Research-based: Remember you are gathering data. You aren’t looking for an improvement outcome or to solve a problem.
- Test: Finally, this should truly be an opportunity for you to gather data over a sufficient period and learn if your assumption changes at all.

Most likely, many of our assumptions came into our lives at a young age. For me my assumptions grew from experiences early in my life when I experienced events that led me to believe I wasn’t as good as, as smart as, and as attractive as...(you insert the

adjective). As a result, I created assumptions I may not have the same opportunities as my peers or be as successful at living the life I wanted for myself. While I didn't realize it at that time, I was still clinging to my big assumption that my greatest career experiences and development potential were behind me. Sure, taking this step to begin this new development assignment was a move in the right direction. But it was rather safe and kept me from facing my fear that I had too much to lose if I left my current company to achieve my goal of transitioning to a Human Resources function to use my MSOD knowledge in an organizational development or culture role.

Soon after starting my new developmental role, I began a course in my MSOD program called The Art and Science of Organizational Coaching. I had expectations of gaining knowledge to help me better understand diverse perspectives about the culture of my organization and deeply held values and beliefs that may impede organizational culture change. As a student in the course, I absolutely gained new questioning and listening skills that I could apply to my work. However, the greatest knowledge I gained in the course would force me to hold a mirror to myself and, not necessarily, a magnifying glass to my work. I was introduced to Carl Rogers' concept of unconditional positive regard—defined as “a fully functioning person who was open to experience, able to live in the moment, trusting of their own judgments, free in making choices, and not governed by the value of others” (Murphy et al., 2017, p. 259).

This learning came to me at a critical time when I was making a career step that seemed out of the ordinary; I was taking a lateral and temporary move toward a new line of work that interested me and walking away from an opportunity for a potential promotion that I had waited on for many years. I was doing this in my mid-40s, a time

when many others around me were looking to either maintain or advance the status of their roles during a period of corporate downsizing. As I mentioned earlier in this Capstone, many people I encountered revealed they would not have had the courage to take the risk or they would have made a move for a higher-level role. Now let me be real about my take on courage: I wasn't running into a burning building, taming a lion, or even attempting to challenge my very real fear of heights with skydiving. I was making a mid-life career change when I didn't have to; the stakes were high, and I grew more anxious and uncertain every time I heard from a well-intentioned friend or family member: "I wish I had your courage."

Why was I so anxious? And was this courageous? Adults must grow into and out of several qualitatively different views of the world if they are to master the challenges of their life experiences (Kegan & Lahey, 2001, p. 53). Could it be that although I had worked in change management for many years, I wasn't very good at adapting to change? I placed a lot of importance on being successful in my career. The thought of leaving a role I knew so well and starting over could expose me as a fraud. Maybe I was just in an easy role, and my skills and knowledge weren't that valuable. This fear was very real to me. Here I was in my mid-40s, redirecting my career path. I worked in a competitive culture that truly believed "up the ladder" was the only path worth taking. Yet, the fear of realizing my greatest career accomplishments were behind me was something I wouldn't accept.

For a long time, I was stuck in my immunity and not advancing my mid-life career goal. I hadn't stopped to consider the cost of my inability to act. The years kept adding up, my feelings of boredom and frustration increased, and I was not advancing my

goal. Unconditional positive regard played an important role in my ability to accept the stage of my career journey without judgment and tackle my deep-rooted assumptions. As described by Murphy et al. (2017):

The unconditionality of positive self-regard can be thought of as a proxy of psychological well-being. The more unconditionally self-accepting a person is whatever their desires, intentions, motives, and behaviors, the less distress will be experienced. Higher levels of unconditional self-regard will, hypothetically, be accompanied by a greater sense of psychological well-being. (p. 260)

This quote echoed in my mind: “The curious paradox is that when I accept myself just as I am, then I can change.” I was where I was. Simply put, this was my journey—no one else’s. Viktor Frankl, the psychiatrist who survived a Nazi death camp and went on to write the book entitled “Man’s Search for Meaning” noted that “in our response lies our growth and our freedom” (David, 2016, p. 5). I was choosing my response to this change. I had started a momentum toward my more meaningful life—driven by my values. And no matter what happened on this journey of unknowingly testing my assumptions, I was in charge. What follows next are three examples of how I took learnings from the UPenn Organizational Dynamic program, applied them to my new career opportunity, and created a test for two of my assumptions upholding my immunity to change.

Driving Change with a Transition Monitoring Team Leading the Momentum

In my new role tasked with diagnosing and transforming culture, I was anything but bored, and I had a stage for testing my assumptions. My role developed because of a reorganization designed to increase Research and Development (R&D) productivity and mitigate loss of exclusivity on several blockbuster products. My company made a transformational move to bring together experts, services, and capabilities at an enterprise

level to support and advance the company's mission. The new Strategy & Commercial Operations organization combined six functions that offered varied areas of expertise—from board level strategic planning to sales operations to meeting planning. And they were being asked to think and operate as “one.” Another challenge was each function came with their own unique culture and defined the value they delivered to the business quite differently. There was also a competitive nature among the functions—with many teams believing the skills and services they delivered were better than others.

A catalytic mechanism took place that started to transform the function's goals into reality and gave me the opportunity to begin my new career journey. As Collins (1999) points out, “A catalytic mechanism distributes power for the benefit of the overall system, often to the great discomfort of those who traditionally hold power” (p. 74). For us the catalytic mechanism distributed power to employees at all levels of the six functions by allowing them to define how they would work together to serve the business. With input from colleagues, new culture traits were defined with the goal of uniting disparate teams that came together under one umbrella. The leader of the organization communicated to the organization that considerable time had been spent optimizing these teams so the time was right to unlock the power of each team's collective expertise to deliver more value for my company and achieve a mission: Be an engine for transformative efforts to accelerate to tomorrow's R&D and commercial models.

Mindsets and behaviors were defined for each new cultural trait, creating instructions for creating the new culture just as American anthropologist Clifford Geertz (1973) described in his modern definition of culture:

Culture is best seen not as complexes of concrete behavior patterns – customs, usages, traditions, habit clusters – as has, by and large, been the case up to now, but as a set of control mechanisms—plans, recipes, rules, instructions (what computer engineers call “programs”)—for the governing of behavior. (p. 44)

The cultural traits were defined to serve as *habitus*—a unifying principle of practices in different domains (Swartz, 1997, p. 34).

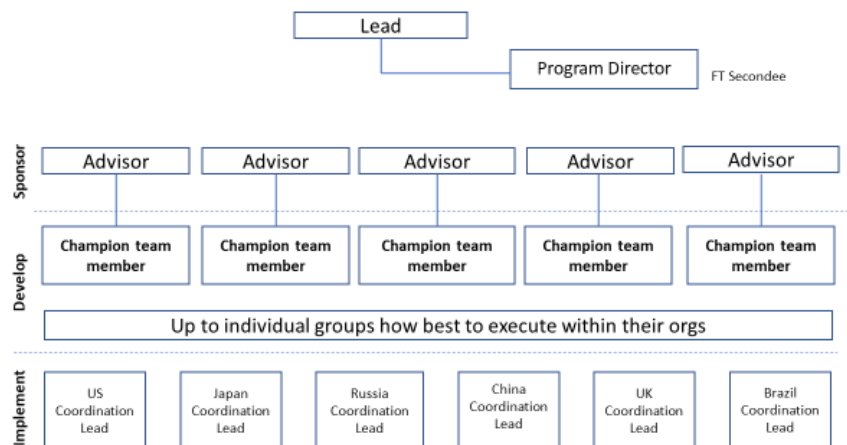
I immediately began applying the learnings from another UPenn Organizational Dynamics course entitled Organizational Culture Theory and Practice to evaluate the current culture and understand the barriers to adopting new mindsets and behaviors. I was exposed to different models, readings, and tools, and I applied them to bring the teams together for a common goal, playfully tear apart processes that were difficult to use, and guide leaders to address paradox and support employees during a period of change.

After the culture was defined with input from employees, I created and led a team of individuals focused on developing a plan to embed culture traits across the organization. The team I developed served as what William Bridges, PhD, refers to as a Transition Monitoring Team. Using Bridges’ guidance, the team I created included three levels of participants and spanned functions and regions to gain diverse points of view and reach multiple layers of the organization around the world. Members of the team included those nominated by executive leaders as well as those squeaky wheels who would provide candid feedback about the direction of the new organization and the culture effort underway (Bridges & Bridges, 2017, p. 167).

Ironically, at the same time as I was testing my assumptions and trying on new mindsets and behaviors in my new development role, I was also leading a multilayered team to guide employees on how to deliver business impact with the newly defined mindsets and behaviors through a series of communications and learning events.

Figure 7. Transition Monitoring Team Example

Culture Team Construct



I structured the Culture Team (see Figure 7) to include three levels and defined the roles, general responsibilities to include in their annual performance goals, and an estimated time commitment for their participation:

1. **Culture Advisors:** Made up of leaders one level below the executive leadership team with a 5% time commitment. Nominated by the executive leadership team and tasked to:

- Serve as Liaisons between Culture Team and their respective Leadership Teams (LT)
 - Drive engagement, involvement, and action of respective LT teams
 - Facilitate leader participation in driving culture in their own organizations
 - Engage leaders in putting the culture into action

- Participate in milestone decisions for plan, along with other Culture Team Members
 - Provide feedback and input into program development and key initiatives
 - Ensure cultural appropriateness for global audience
- Help drive key communications via the respective leadership teams
- Serve as ambassadors for the initiative

2. **Culture Champions:** Made up of individual contributors at varying levels with a 25% time commitment. Half were nominated by the executive leadership team and others I identified based on their ability to express candid feedback about the culture. They were asked to:

- Serve as liaisons between Culture Team and respective sponsors, teams
- Work with respective team leaders to ensure understanding, alignment and needed actions for the culture initiative
- Coach functional Vice Presidents in culture aspects
- Actively participate in planning & development of culture initiative
- Contribute to creation of overall program strategy and resulting programs and communications
- Partner to implement culture plans and activate networks, drive communications in respective areas
- Seek out and proactively share feedback, including potential challenges from respective teams
- Share learnings with broader Culture Team to ensure continuous learning

- Serve as ambassadors for the initiative

3. **Country Coordination Leads:** Made up of individual contributors at junior levels in the six largest markets with a 5% time commitment. Half were nominated by the Culture Champion team and others I identified based on their passion for their local culture or ability to influence participation at their local site. They were asked to:

- Create compelling local programs and reinforce newly define cultural traits
- Drive coordination and logistical implementation
- Serve as workshop facilitators as appropriate
- Support measurement locally to understand acceptance and movement of cultural issues throughout the local organization
- Proactively share feedback with Culture Team from local market perspective to enable continuous learning
- Serve as advocates for the initiative & role model culture traits locally

Qualitative and quantitative research I led revealed that in a little over 12 months, the 16-member team advanced adoption of the culture traits and led all dimensions of the annual employee engagement survey to increase to greater than 74% favorability. Overall engagement scores were achieved by bringing the culture to life around the globe. The data I gathered in surveys and focus groups told us that culture mattered with 80% of survey participants sharing that all traits were critical to the organization's success and 90% of people leaders indicating they had culture conversations with their teams. There

was still work to be done, however, as colleagues suggested more opportunities to come together outside of project work to collaborate and foster more disruptive ideas to advance the organization's goals.

Shifting Focus with Appreciative Inquiry

Human systems grow in the direction of what they persistently ask questions about and this propensity is strongest and most sustainable when the means and ends of inquiry are positively correlated. —David Cooperrider

I was on my journey seeking any silver lining I could find to apply my newly acquired knowledge in my new role, test my limiting assumptions, and advance my mid-life career goals. And, at that very moment, during my studies in the UPenn Organizational Dynamics program, I was introduced to appreciative inquiry (AI)—what Cooperrider and Whitney (1999) refer to as the “positive change core.”

AI is a tool for connecting to the transformational power of this core by opening every strength, innovation, achievement, imaginative story, hope, positive tradition, passion, and dream to systematic inquiry... It involves asking appreciative questions and uses the stories generated to create, new more compelling images of the organization and its future. (p. 246)

I was evaluating results from the culture survey I just deployed that asked 3,000 global employees across six diverse teams to assess how well they believed their function was in adopting new mindsets and behaviors to achieve the organization's mission. I was awaiting survey results from the newest and sixth team that joined the organization. This team had bounced around the company several times and had just landed in the organization. Change fatigue was very real to these employees, and my conversations with the leadership team revealed they felt like they could deliver much more value if they had stayed in their previous organizational structure—closer to the therapeutic areas

they served. They didn't see how the move offered any advantage to them or the internal customers they served.

I also had just received an invitation to discuss the survey results at the annual Mid-Year Meeting in which the second level of executive leadership would gather to check in on mid-year goal progress, leadership development, and strategic planning. The data in the survey revealed that each function had different strengths and opportunities. I could go into the meeting, present the data, call out the problem areas, and take a deep dive into root cause analysis. But I recall thinking that would be a very "rearview mirror" approach. Instead, I needed to identify a way to use the data that would drive meaningful change and get these data-driven leaders talking about how to unite their teams to achieve the goals of the organization.

Taking concepts learned from Cooperrider and Whitney (1999), I served as what they would refer to as an "agent of inquiry," (p. 252) planting the seeds of AI and inviting leaders attending the Mid-Year Meeting to participate in a workshop to share and discuss their culture strengths. The workshop was designed to serve as a cooperative learning and co-creation process to uncover any siloed culture strengths and defuse leader defensiveness and competitive mindsets by showcasing the advantages of sharing unique strengths to inspire actions that can benefit the whole organization (Cooperrider & Whitney, 1999, pp. 252-253).

First, I sent leaders a pre-read before the event and asked them to review the culture strengths identified by each team in the culture survey so they could come prepared to share what their team was doing to achieve these great results. I encouraged them to consider how to use this opportunity to ask questions, listen to stories, learn from

best practices in other teams, and gather tangible ideas and actions they could replicate to effectively impact the culture and help their team carry out their part in achieving the mission.

Given the participating leaders were data-driven, I introduced the workshop using positioning from the business book entitled “Strengths Finder” by Tom Rath—a name and quantitative assessment I thought would resonate better with leaders than academic terms such as appreciative inquiry or AI.

I wanted the structure of the workshop to have a positive tone, and the attendees needed to be divided into diverse groups to balance the discussion and give space for them to see the strengths of the other functions. Realizing I couldn’t be at every table, I identified peers who could attend the workshop and serve as passive facilitators within each group. I held a facilitator’s session to brief them on AI and review the goals of the workshop. Using tenets of one of the basic AI principles—The Positive Principle—I coached the facilitators to guide their group to build camaraderie, ask positive questions, and highlight that while they each bring a unique strength, they are creating something meaningful together (Cooperrider & Whitney, 1999, p. 258).

As the table discussions began, I watched and listened as the energy of the meeting changed. A quiet room grew louder and louder with some tables having multiple side conversations and laughter erupting as stories were shared. The post meeting results revealed that participants rated the session the second highest of the meeting because it increased their awareness of how other departments could come together to collaborate and operate “better together.” In many ways these leaders had tested their own limiting assumptions in this meeting. The modest experiment provided an actionable opportunity

to try on new collaborative mindsets and collect data from their peers. This experience allowed them to see the “sum was greater than the parts” and the real value they could collectively deliver to the organization by moving outside their siloes and leveraging each team’s unique expertise and networks.

Amplifying Employee Voices with Liberating Structures

*The secret of **change** is to focus all of your energy, not on fighting the old, but on building the new. —Socrates*

As previously mentioned, my company—similar to most organizations—conducted an annual employee engagement survey to gather feedback to better understand several areas of the employee experience and gauge work satisfaction. While in my role leading culture, a Vice President of Training approached me after receiving results from the annual employee engagement survey. Results from her team indicated that work processes were not well organized and efficient—a dramatically lower approval rating, which was down 12 points compared to the rest of the company. She shared that history was repeating itself. An effort was made to diagnose and act on similar feedback that surfaced in the prior year’s survey. At that time the Vice President and her leadership team invited colleagues to discuss the engagement survey results and seek input on root causes and how to address opportunity areas. The discussions led to changes in the budgeting and monthly accrual process—by colleagues deemed as experts. However, the new annual engagement survey results indicated more work needed to be done to improve work processes and better understand what was getting in the way.

After reading the book entitled “The Surprising Power of Liberating Structures” by Henri Lipmanowicz and Keith McCandless, I introduced the concept of Liberating

Structures to the Vice President and suggested that by inviting all involved and using simple, practical methods, critical conversation could take place that could lead to uncovering what was really behind these low scores and the design of better solutions to improve processes. The Vice President agreed to try this new approach.

Liberating Structures involves 33 varied methods to invite members of an organization or community to come together in new and different ways to work together. The methods can be strung together to facilitate discussions, problem solve, and interact. They are liberating because they deviate from the standard PowerPoint presentation, brainstorming session, or after-action review; they invite all who are interested to participate in building the outcome for all involved.

I used Liberating Structures to unpack the mystery in the annual engagement survey results and invite all interested and willing participants into the conversation. I began by clearly defining the purpose and outcome of the session. This framing led to the design of a Liberating Structure session to tackle the COE's process challenges. The purpose was to understand the explicit, tacit and latent observations and feedback about COE Work Processes. The desired outcome was to engage COE colleagues in developing solutions for improving work processes.

I paid close attention to the structural elements that establish how control is exercised over a group of people working together (Lipmanowicz & McCandless, 2016, p. 14). The invitation to the session came from the COE Vice President and was drafted to stress ownership from colleagues; it was made clear that those invited were being asked to not only share feedback but also be part of the solution. I held the session in a space that was comfortable and relaxed. Rather than use a conference room, I opted for a

tiny and secluded corner of the building designed more as a living area than a meeting space. The area included a couch, chair, coffee tables, plants, TV monitor, and the all-important white board with markers and erasers. This setting allowed for all in the group to participate equally—no one was seated front and center. I outlined a string of Liberating Structures and the sequence of steps with time allotted for each.

Every beginning needs a clear purpose and a vision for where the journey leads. I reiterated the desired outcome at the start of the session, noting this was not an exercise to create enemies among stakeholders involved in the process or to dwell on past attempts to solve the process challenge but, instead, to chart a new journey to uncover insights and liberate new ideas they could take forward for solving the challenge.

I started the team on the first Liberating Structure called Drawing Together. Nonverbal expression can be a powerful tool, according to Lipmanowicz and McCandless (2016): “You can help people access hidden knowledge such as feelings, attitudes, and patterns that are difficult to express with words” (pp. 247-250). I adapted the Drawing Together exercise to allow participants to draw their actual experiences when encountering the inefficient and unorganized finance process. Prepared to wait for some uncomfortable silence, I was pleased when the first participant quickly jumped up to head to the white board to grab the markers.

Within minutes the participant started to diagram the process and revealed that they must navigate 11 systems during the process and interact with multiple people—many of whom the team has either never spoken to or met. This description engaged the second participant in describing the process as forensic accounting rather than what they felt should be a simple process that answers this question: Am I on budget or not? Both

participants realized the importance of the answer to this question to all involved—the team, the leaders, and the company at large need to know if money committed has been spent as planned. However, the participants indicated the process felt a lot like sleuthing rather than reporting.

As the drawing continued a few additional insights emerged. The participants expressed that more systems do not yield more value. Instead, the multiple systems complicated the issue and created more data. They conveyed this insight with the images of garbage cans and described the experience as creating noise or, in the case of their drawing, garbage. They conveyed this extra data as garbage that crowded their ability to answer the question: Am I on budget or not?

Once the participants' energy from Drawing Together slowed, I asked the pair if they wanted to keep going and try another exercise that might allow them to creatively break down these drawing insights even further. They were eager to keep going so I introduced a second liberating structure called a theory of inventive problem solving (TRIZ), which Lipmanowicz and McCandless (2016, pp. 187-190) developed using inspiration from the Russian engineering approach that invites creative destruction and “let's go of the compulsion to control” an outcome (McCandless, 2021). I presented participants with the opportunity to design a finance process that was not well-organized and efficient. To get participants into the mindset of TRIZ, I suggested they design a process for their enemy. I encouraged them to think of their rival sports team or a movie villain they love to hate for the purpose of designing.

After generating a list of elements that could be even more inefficient, the pair identified features that existed within the team's current finance process, which included:

- More than 11 systems
- No strategy or guidelines for spending and tracking the budget
- A lot of nameless and faceless people in the process
- Forensic accounting
- COE finance lead who changes frequently

After watching the participants engage in TRIZ, I quickly saw the juxtaposition to appreciative inquiry and appreciative interview—another Lipmanowicz and McCandless (2016) structure that builds on the root cause of success (pp. 182-186). The very act of writing down how to design the worst system revealed the pieces of the process that are efficient and effective, which created positive energy to move the improvements and redesign forward. Similar to how I was testing my assumptions with the immunity to change tool, Liberating Structures introduced the team to new paths for solving process problems. These simple exercises were research-based and invited them to playfully come to the problem with a different lens. No one involved in designing the process was there, which made it a safe place to explore. While the process issue was not solved, this approach yielded small, actionable ideas and showed them they had options and power to bring positive change to the process.

I introduced the pair to the final structure called 15% Solutions developed by Lipmanowicz and McCandless (2016, pp. 191-193). The exercise created energy for what could be done using the influence and discretion the pair had right now to address the finance process challenge. The two participants identified realities and actions—however

small—that they could do immediately to create momentum and make a big difference, which included:

- **Current Reality 1:** The process includes a lot of nameless/faceless people in the process.
- **Liberating Action 1:** Create a document of all people involved in the process.
This simple contact list gives all members of the team a list of names, locations, email addresses, and phone numbers of people to contact when facing challenges and issues that could be experienced throughout the process of answering the question: Am I on budget?
- **Current Reality 2:** The process includes interactions with 11 systems.
- **Liberating Action 2:** Perform an audit of all systems to determine the unique purpose and need for each system. Does each add value? Interact with other systems? Are all needed? How frequently are these systems used?
- **Current Reality 3:** There is no documented training to understand the process.
- **Liberating Action 3:** Create a document that outlines the recommended steps to take to effectively navigate the budgeting process—include all the systems and pathways for answering the question: Am I on budget? Make this available to all members of the team and require managers to understand it and discuss it with their teams. Make this training available during new hire onboarding and the annual transition of the team finance lead.

A go-to practice of many corporations and organizations is to design processes with input by the people deemed as “experts.” The first two Liberating Structures showed the power of engaging users of the process in a discussion to improve the process. The

discussion avoided best practices and examples from other teams; instead, the focus was on the experiences of the users, which led to discussions to improve outcomes.

Analyzing My Test Results

The three examples I shared in this chapter allowed me to take my learnings from the UPenn Organizational Dynamic program, apply them to my new career opportunity, and create iterative tests for two of my assumptions upholding my immunity to change. These experiments allowed me to understand that my greatest career experiences and development potential were indeed not behind me. This work and these tests placed me in different scenarios, designing exercises to engage executive leaders on the topic of culture change. I was gaining double the learning as I tested my own big assumptions and designed, ran, and interpreted tests to collect data on how my organization could adopt new mindsets and beliefs to drive the culture forward for the new organization. The work challenged me to influence my peers to drive meaningful change without direct authority. The introduction of dynamic and engaging exercises allowed me to invite my colleagues to solve problems that gave them the greatest difficulty in getting their work done.

After reflection I realized I had much of the knowledge to serve this role; therefore, I was qualified for the roles that interested me. However, I also learned I had a runway to continue to practice, apply new learnings, and grow as a practitioner in this space. Given that my developmental assignment was to last one year, I was invited to extend it to a second year, which I took as a pretty good sign that I could achieve my mid-life career change goal to transition to organizational development and culture work. While I wasn't ready to write the next great book on culture diagnosis and change, I was

giving way too much strength in allowing my big assumptions to drive my career journey forward. And that had to stop. It was time for one foot on the gas and the brake at a time.

In Chapter 4 I describe how I evaluated my relationship with my big assumptions and my unconscious and conscious immunity to change.

CHAPTER 4

WALKING MY WHY AND UNPACKING MY IMMUNITY TO CHANGE

Now that I had tested my assumptions, I felt lighter. I was not entirely free of my own competing commitments but held them much more loosely. There was a spring in my step. I had a greater sense of confidence that I could continue to experience development and growth in my career and that I had the skills and knowledge to draw upon when I entered a new role or assignment. As time marched on in my own personal learning lab, I grew more certain that I had “unconsciously released” my assumption that my greatest career experiences and development potential were behind me.

When becoming unconsciously released, “new beliefs and understanding, informed and developed mindfully throughout the process, have taken the place of the big assumption.” (Kegan & Lahey, 2009, p. 273). My data came from the experiences I had gained, the stories I could share, the networks I had built, and the lessons I had learned. Together this information changed my beliefs, so I abandoned the idea that my best work and my greatest opportunities were behind me. More importantly, that assumption no longer drove how I made decisions and created meaning for my mid-life career goals. Similarly, I also learned that I had “consciously released” my other tested assumption that I am not qualified for the roles I want. As described by Kegan and Lahey (2009):

When you can act on your newly discovered knowledge to interrupt the big assumption (and the old behavior and self-talk patterns associated with it) in those situations where it is not valid you are demonstrating the new capacity to be “consciously released” from your big assumption. (p. 273)

Even though I was not “unconsciously released” from this assumption, I had developed skills and processes to redirect my negative self-talk and was made aware of when this assumption could try to bait and “hook me.”

During the Minds at Work workshop I learned that a hook is what can lead you to rely on your big assumption and keep you immune. In contrast, a release is what lets you choose not to rely on your big assumption when you know it isn’t accurate or useful to you so you become released. While it was great to be “off the hook” of my assumptions, I knew my big assumptions could return—just like a pound or two that I occasionally see creep back when I step on the scale to weigh myself. And if they did return, how would I handle them? I share those details in Chapter 4, along with details on how I tested my other assumption—looking to understand if a new job would provide all that I had enjoyed in my current role with my longtime employer.

The Surrender

If you surrender to the wind, you can ride it.

—Toni Morrison

It was the peak of the summer, and my development assignment was humming along. I had just been asked if I would like to stay on another year to continue to lead the culture integration work. It was music to a Reluctant Mid-life Career Change Heroine’s ears. Fast forward a few months: It was fall, and a big announcement came that our Chief Executive Officer (CEO) was retiring and another member of the executive leadership team would take his place—along with that news came a major reorganization in the company. The executive I was working with was retiring as part of the upset, and a new leader was taking over her organization in which I was working. I learned my

development assignment leading culture change was ending as the organization took time to reevaluate the new organization design. News came that my old learning and development role was waiting for my return. I had survived another round of corporate layoffs.

In the game of corporate reorganization, a soft landing like this would be reassuring to many mid-life career professionals. Not for me. I wasn't okay with the idea of going back to my role—even temporarily—while the dust settled from this latest organizational upheaval of leadership changes. I was done with settling and adding numbers like my age and years of service to reach some magical equation that would free me of my golden handcuffs. Instead, I was excited by possibilities of identifying a new role in which I could apply learnings from my UPenn studies.

The latest round of organizational changes was huge—the biggest since the last large corporate merger I had survived. The new CEO of the company announced it was time for the company's organizational structure and priorities to change, making what he described as “bold moves.” I recall reading the announcement when it crossed my inbox. It really resonated with me but, ironically, not in the way I am sure it was originally intended. Instead, it signaled to me that it was the right time to make a bold move toward driving the change I wanted, instead of navigating the change around me. And just like that the chorus of change survival I knew for 14 years stopped serenading me with this group think, socialized mind melody that surviving another downsizing meant career happiness and success. The company may have been making some “bold moves,” and now I was ready to make some of my own.

I had been so very close to achieving my goal of switching my career path in my safe and comfortable place with my industry-leading employer. I was driving change and culture integration for a C-level executive at the largest company in my industry. And days later I had that feeling from my childhood of slipping on wet grass and falling on my back with such force that I couldn't speak or take a breath. These newly announced "bold moves" were what Dr. Sarah Lewis (2014), a teacher and the author of "The Rise," would refer to as an "aesthetic force":

What we lose if we underestimate the power of an aesthetic act is not solely talent and freedom of expression, but the avenue to see up and out of failures that we didn't even know we had. Aesthetic force is not merely a reflection of a feeling, luxury, or respite from life. The vision we conjure from the experience can serve as an indispensable way out from intractable paths. (p. 105)

Lewis has researched and examined history to explore how some of the greatest failed attempts have redirected humans to some of the world's greatest achievements—all when we surrender or choose to give in instead of giving up. As I processed this aesthetic force or turn of events, I realized what I would be giving up if I allowed my big assumption to return and hook me. If I followed the group think and rejoiced at the thought of returning to my old position and if I had waited for that perfect role at my current employer, I was placing my career goals and destiny in their hands. I would be living their bold moves. I chose to give in—not give up—and look for my next step outside the four walls I had worked in for the last 14 years.

As noted by Lewis (2014): "There is no way to measure surrender's impact. We know its efficacy when we see it: After the deep pain of coming close, of failures of all kinds, we break open enough to contain, invite, and triumph over more" (p. 87).

My role as I knew it was ending. I realize now that my greatest worry—the one I had defined in my Immunity to Change™ map—hadn't come true. But what I chose to do next would have an impact on keeping those worries alive. I had spent almost 18 months in an organizational development and culture role that gave me purpose and allowed me to apply my new knowledge and skills. I loved the work. I looked around and saw my peers worried about losing their jobs. Here I was worried about keeping one and having to go back to a role that no longer served my interests and aligned to my purpose. I had two choices: stay or surrender. I raised my white flag and asked my manager for a severance package that was available to me through a tiny change of control clause I identified in the separation materials shared with the new CEO's message of bold moves.

In many ways my departure felt like a breakup. After 14 years my relationship with the company was the second-longest relationship outside my marriage and relationships with friends and family. I knew I was making the right decision, but it didn't lessen the pain of walking away from something that had been very good and comfortable to me for a long time and, in the case of my latest development assignment, felt like had just slipped through my hands and vanished. Like it or not, every good ending needs a breakup song. I had mine. The pop hit of the year was playing on the radio every time I got in the car to shuffle my teen and tween daughters to school, field hockey, soccer, or a friend's house. The first verse and pre-chorus felt like my life at the time. For kicks and giggles sometimes, I would add the separation wave number I was in when I sang along in the car.

Would you believe me now if I told you I got caught up in a wave?
Almost gave it away

Would you hear me out if I told you I was terrified for days?
 Thought I was gonna break
 Oh, I couldn't stop it
 Tried to slow it all down
 Crying in the bathroom
 Had to figure it out
 With everyone around me saying
 "You must be so happy now"

Colleagues who learned of my breakup plans would ask, "Where are you going?" I'd reply with a big smile and a knot in my stomach, "I don't know." During this time I found myself with oscillating feelings—ecstatic with my "bold move" courage one minute, scared by my "bold move" the next, and, in general, concerned I had lost my bleeping "bold move" mind. Applying elements of emotional agility, I didn't ignore my feelings but used them to drive me toward my values and used my time to take extra courses to finish my graduate studies. I was letting go of my immunity, which allowed me extra energy for other pursuits. While I had previously only given myself space and time for one course per year, in 2019 I took four courses. Stimulation from continuous learning and the severance package were in many ways my life preserver and provided me with the courage to make an anxiety-ridden decision that rallied against my greatest fear. I'd be lying if I said I didn't struggle. I remember sitting at my dining room table reviewing the separation contract with my husband. I looked at the vesting of long-term incentives and the benefits I was leaving behind and said to him, "Who am I to give this up? I may never have this again." He looked at me and said words that chilled me because they were so honest: "Most people never achieve this, Kim. And you may not have this again. But there's no turning back now."

It was true. There was no turning back now. I was loosely holding my big assumptions and had one foot off the brake. I was making decisions and headed toward advancing my mid-life career goals and walking out the door of my longtime employer.

Crossing the Bridge

Creativity is allowing yourself to make mistakes. Art is knowing which ones to keep.

—Scott Adams

The break from work gave me the gift of time to reflect on my assumptions and make new meaning from my experiences. My reflective learning told me that I couldn't wait for the perfect role to come along; my history of past behaviors might suggest I would try. I did have the opportunity of time gifted to me by the severance package but I was eager to get started and didn't want to settle into this comfort and delay another "bold move" along my mid-life career journey. I started to think about what was most important to me in this next role and began to define the must-haves. To achieve my goal, I needed experience working in a human resources department. I wanted to see and touch as many of the human resources teams as I could. I wanted to see how they all came together to influence the employee experience and impact the organization's strategic goals and culture. I had been decentralized for most of my work experience, and I wanted to practice at the enterprise level.

After a few months of interviewing at many companies, I accepted a Vice President of talent development role that gave me the opportunity to serve as a member of the Human Resources leadership team of a public company in the insurance industry. When I accepted the role, I knew it wasn't perfect. For starters, I had spent my entire career in the healthcare industry and the last 10-plus years traveling the world working

for a global company. These were two aspects I loved about my work. However, I was willing to compromise for an opportunity to hone my human resources skills and see all the levers playing together at once—talent planning, organizational development, culture change, internal consulting, and coaching. This would be a great opportunity to practice my craft in a smaller organization and see all the pieces come together to serve the entire organization. As it turns out it would also be a great opportunity to test two of my original big assumptions: that a new job would provide all that I had enjoyed in my current role with my longtime employer, and if I make a change and don't like the job or company, I'll be stuck there.

My team was all that you could ask for—skilled, engaged, helpful, and fun to work with. However, before long I realized one of my big assumptions was indeed true—a new job would not provide all that my former role had. While my new role checked a lot of boxes for my growth and development, I hadn't stopped to consider how I would make meaning in my work when I transitioned to a new industry—one far removed from my 20-plus career in healthcare in which I went to work and engaged in a mission all about improving the lives of patients. I felt a bit lost in this new corporate culture and didn't see how my days at work connected to the values that had been shaped throughout years of mission-driven work.

I was in a liminal state—a common occurrence in career change, returning to work after time off, or early retirement. The concept of liminality was initially developed by French anthropologist Arnold van Gennep and then later further expanded by British anthropologist Victor Turner. Turner (1982) suggested that the liminal phase can be viewed as a sort of “social limbo” in which an individual is transitioning between

identities and may have difficulty letting go of the past and embracing the present (p. 24).

I was what Turner would refer to as “betwixt and between.” I had left my longtime employer and was searching for a new role that would allow me to gain experiences I needed to achieve my mid-life career change goal. But I also needed to feel like a part of the culture, live my values, and feel purpose from my work. Something was missing.

I decided I would give the role some time. After all, I had spent 14 years with my last employer. I needed to give this new experience a chance. I had come too far not to give it up.

Hearing a New Voice in My Head

Six months into my new role, I saw a posting for a job that looked—dare I say it?—perfect. It was back in the healthcare industry I had just left. It was a global company. The role was part of the extended human resources leadership team. I began debating whether or not to apply.

Emotional agility would tell me that my monkey-mindedness and old, outdated thinking were back and telling me that “Kim, you knew this wasn’t going to be a long-term job for you. But you should really stay here for a full year. Check that box. You know that hypothetical box you created from your fears, competing commitments, big assumptions—the things telling you that one year is a magic length of time to show on your resume so no one will ever think less of you and your career experiences.”

Psychologist and author Ethan Kross has examined the conversations we have with ourselves and the impact of this “chatter” on our lives. Similar to the sneaky assumptions discussed in this Capstone, Kross’s research reveals that we too often allow negative self-talk to negatively direct our lives. He found that if we can separate

ourselves from the “echo chamber of our minds we can adopt a broader, calmer, and more objective perspective for combatting chatter” (Kross, 2021, p. 162). He suggests multiple techniques for using “distanced self-talk”—the one I actually applied in my mid-life career journey is Kross’s “imagine advising a friend” in which you consider “what you would say to a friend experiencing the same problem as you. Think about the advice you’d give that person, and then apply it to yourself” (Kross, 2021, p. 162).

I challenged that new big assumption along my mid-life career journey by asking myself, “Kim, if a friend came to you and told you they found the perfect role that they had been waiting for but had just started another role that they know isn’t long term, would you tell them to apply to this job?”

The answer was obvious. Of course, I would tell them to apply. And that’s exactly what I did. Unconditional positive regard, right?

I could have easily kept crafting my mid-life career journey in this bridge job. However, this didn’t feel like my story. I was the head of my own “transition monitoring team” (Bridges & Bridges, 2017, p. 167), and my mid-life career journey was about to begin again with an ending and finish with a new beginning. In the late summer of 2020, I started a new role as Senior Director of Change Management and Culture at a large, global company in the healthcare industry. As I write this Capstone, I can share that I just completed my 1-year anniversary in this role. And I proved that one of my original big assumptions was wrong: If I make a change and don’t like the job or company, I’ll be stuck there.

Supporting Others on Their Journey

In the middle of tackling my new culture and change role and working on this Capstone, I decided I wanted to be there for people like me who had drifted from their goals and got lost in their immunity to change. I saw that Minds at Work was partnering with New Profit, a venture philanthropy organization that backs breakthrough social entrepreneurs who are advancing equity and opportunity in the United States. They were looking for certified Immunity to Change™ coaches to support a Future of Work Initiative that would pair coaches with members of The XPERT Worker Advisory Board, which was designed by New Profit to amplify the voices of impacted workers in the creation of equitable training, job placement, and workplace experience solutions that meet their needs. I was excited about the opportunity to make a difference for workers, build a coaching learning community, and practice my Immunity to Change™ map making skills.

To qualify as a New Profit coach, I needed to apply for and receive my Immunity to Change™ map making certification. To meet the requirements, I submitted two maps that showed I could apply the diagnostic tool with two “coachees” experiencing an immunity to change. For each map I was asked to describe where I thought the map was particularly strong, where I think it needed to be tightened up, and how the big assumptions explained the immune system taking hold. Finally, I needed to share how I might work with the coachee to dig deeper into Column 4 of the map and work with the coachee to design tests of the big assumptions.

I earned my certification in January and went on to begin working as a volunteer coach in April. The experience was challenging and rewarding, allowing me to build my skills to listen carefully for my client’s competing commitments and help them uncover and test their big

assumptions that prevent them from changing and achieving their most important goals. I'd like to think I helped my client reframe his thinking and address his fears with testing his assumptions. The truth is he gave me a gift, too: the grace to allow me to use my knowledge and experience to invite me into his story and allow me to help him think more deeply about his own immunity.

A Full Circle

In the middle of the Immunity to Change™ map is a circle that depicts the immunity taking hold by feeding on the actions, beliefs, fears, and assumptions that span the four columns of the map. My story is a bit like that circle. I defined my immunity to change, vulnerably stated my fears, tested my assumptions, and broke my immunity to change. The change was hard, and the pain was real at times. But, in the power of the triumph and the struggle, I came back to the map to help others like me who desperately want to advance their goals but are stuck in their tracks.

CHAPTER 5

CONCLUSION

I entered the Organizational Dynamics graduate program at UPenn with a destination in mind—a new job, a promotion, a bigger team. Ironically, all of that happened but not until after I let go of the destination mindset and found myself on a journey. My story is a journey along two roads that finally meet. One road took me to acquire new skills and knowledge. It led me down paths to apply that knowledge and test my abilities. Another road took me to reframe my views of the world and see myself in new ways—caring less about what others think of me, living by my values, and redirecting my career in mid-life when the stakes are high.

Television host and best-selling author Bruce Feiler spent several years conducting interviews and gathering stories for his book entitled, “Life is in the Transitions: Mastering Change at Any Age.” He researched how Americans navigated major life changes and learned that “the meaning we make from our lives is not static or stable” (Feiler, 2020, p. 121). Feiler (2020) reflected from his research discoveries:

We have a choice in how we tell our life story. We do not write it in permanent ink. There are no points for consistency, or even accuracy. We can change it any time, for any reason, including one as simple as making ourselves feel better. After all, a primary function of our life story is to allow us to place experiences firmly in the past and take from them something beneficial that will allow us to thrive in the future. Only when that happens will we know our transition is complete. (p. 293)

Of all the lessons I learned on my journey, I leave you with three brief thoughts you can apply to help yourself, guide the teams you lead, influence members of your organization or community looking to make change a reality:

Don't cheat yourself. Change is hard. But remember you always have the power of choice. Resist giving up your power to stay comfortable and protected from your greatest worries. Instead, be curious and explore the possibilities that are in front of you.

Check your belief systems. Our values and our priorities evolve as the years go by. Make sure you are evaluating if yours still fit you today. You may be holding on to values that serve someone else or a former you. Release what no longer serves you. Take time to assess and make plans for how you will address any miscalibration.

Bold moves don't have to be big. Start small. Test the waters. Focus on small moves you can make to test your assumptions. Try on small changes, see how they fit, and go from there.

Thank you for your time as I brought you along in my journey of continuous learning and growth. I'm off to ponder some more bold moves.

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